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## **Croatia**

### **Grain and Feed**

### **Annual Situation and Outlook**

## **2000**

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#### **Report Highlights:**

**Croatian wheat production should rebound in 2000. Area planted to winter wheat is estimated at 200,000 hectares, and new production subsidies should stimulate output. Greater liberalization of trade in cereals is anticipated through Croatia's pending accession to the World Trade Organization.**

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Includes PSD changes: Yes

Includes Trade Matrix: Yes

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## **Summary**

Croatian wheat production is expected to rise in year 2000, since farmers have shown an increased interest in this crop, due to the fact that the crop falls under the Croatian government commodity support system, which guarantees sales at a known “floor price.” The area planted to wheat in Autumn 1999 is estimated at 200,000 hectares. Besides, it is expected that there will be a surge in interest in planting corn, since the Croatian government has approved the introduction of a new production subsidy amounting to 800 HRK/hectare. A slight increase in malting barley area is also expected, mainly stimulated by an increase of the Croatian government subsidy for this crop.

Total arable land sown to all crops in 1998/99 was 1.02 million ha. This presents 8.2 % less than in the previous 1997/98 period. Cereals dominate with a share of about 61.4% of total sown area. In 1999, the trend of structural changes in sown area has continued. As in previous years, the area sown to cereals has been decreasing, with wheat showing the most significant drop. However, during the same period, industrial crops (oilseed crops) and fruits show an opposite trend, toward increase.

On the trade side, Croatia's intention to attain full membership in the World Trade Organization (WTO) during the first half of 2000 should lead to liberalization of trade through reduced tariffs on cereals and cereal derived products.

## **Production**

### **Corn**

Since 1997, corn production has returned to pre-war levels and remains stable, ranging during the last three years between 2.0 and 2.2 million MT and from 377,000 to 386,000 hectares. The average yield in the last three years was between 5.2 and 5.8 MT/ha.

Following the intention of the Croatian government to ensure cheaper inputs for livestock production, the Ministry of Agriculture and Forestry has proposed an area payment subsidy for corn production.

Before the announcement of the 800 HRK/hectare Croatian government subsidy, 2000 corn production was expected to be carried out on circa 380,000 hectares. However, this subsidy may result in a slight increase in planted area.

### **Wheat**

The 1999 wheat production was officially 558,217 MT from 169,280 hectares, but other sources estimate that harvested area may have been much lower, circa 130,000 hectares. This was 45% lower than in 1998, and among the lowest levels in decades. This sharp drop was due to a number of factors of which the most important was a significant cut in the 1998 “floor price” of 32%. Also the “floor price” and subsidy for wheat were announced just prior to the Autumn 1998 sowing season so farmers could not plan what to sow in advance. Unfavorable weather conditions, farmers' lack of cash for

purchase of certified seed, and fertilizer production problems at the major Croatian fertilizer producer (INA-Kutina) additionally had an impact on sowing progress. As a result of all these factors wheat production in 1999 fell by 45%, sown area by 30% and average yields by 22%, compared to 1998.

According to the Ministry of Agriculture and Forestry “1998 Autumn Operational Sowing Plan” wheat was planned to be sown on 220,000 hectares, with final sown area being closer to 200,000.

### **Other grains**

The production of other grains (oats, barley and rye) in Croatia is relatively small. Production area of these cereals constitutes only 8% of the total arable land sown with cereals.

Barley production has been recovering during the last three years, due to reintegration back into Croatia of Eastern Slavonia, which is an important production area for this cereal. In 1999 production was 125,000 MT produced on 45,000 hectares. In 2000 a slight increase in barley production is expected, stimulated by increase in Croatian government subsidies.

Oats is not considered as important grain in Croatia. It is produced on approximately 25,000 hectares. The main production area is the central mountain region where the soil and climate are the most suitable. These relatively marginal production conditions are the main reason for a very low average yield, which is about 2.5-3.0 MT/hectare. Oats production during the last ten years ranged between 47,000 and 57,000 MT.

Rye is not considered an important cereal crop in Croatia, since it is produced on only 2,500 hectares.

### **Consumption**

Total human consumption of wheat is estimated to be circa 550,000 MT, which implies per capita consumption of 120 kg. About 65,000 tones of wheat is used as seed, while feed use fluctuates based on price and availability of other feedstuffs but ranges from 35,000 to 50,000 MT. It is estimated that family farms produce and consume an additional 185,000 MT.

The major part of corn production is used on family farms for cattle feeding (almost 75%). Industrial consumption is declining continuously, and is around 300,000 MT. Human consumption of corn is relatively stable and amounts to 9-10 kg per capita.

Due to the lower level of livestock production, production of barley, which is mainly used as livestock feed, has decreased. About 10% of the total production is utilized in the beer industry.

Oats are mostly used for livestock feeding on family farms, especially in the Central Mountain region. Human consumption of this crop is negligible.

### **Trade**

**Table: Export and Import of Cereals in the Republic of Croatia, metric tons**

	1997	1998	1999
Export	16,703	178,039	74,414
Import	181,521	73,205	75,518

The total wheat trade in 1999 was about 20,000 MT which is 60% less than in 1998, or more than 90% less than in 1995. The main reason for such a low level of trade lies in the fact the Croatian wheat market is highly protected by customs tariffs. In addition, Croatian wheat exports are hindered by their high production costs, and non-competitiveness on the world market.

Expecting a large wheat crop in 2000, in March 2000 the Croatian government decided to export 150,000 MT of wheat from the State Reserve stocks. This turned out to be a hot issue, since these sales on the world market would have to be at lower prices than the domestic "floor price." As of the date of this report, actual sales of this wheat have not been concluded.

At the same time, rumors surfaced of wheat from Serbia being smuggled into Croatia in violation of the Serbian export embargo on foodstuffs. Though discounted by Croatian authorities, the possibility exists that Serbia, able to sell cheap wheat at prices of 150 to 170 DEM per ton, is illegally putting wheat into Croatia.

During 1999 most wheat imports came from Hungary, while the main export market was neighboring Bosnia and Herzegovina.

Exports of corn in 1999 were 59,000 MT, mainly during Spring 1999, with the main export markets being Spain and Bosnia and Herzegovina (circa 65%). Later during the year, corn was short on the local market, with prices soaring as high as 1.10 HRK/kg. As a result, circa 40,000 MT of corn was imported from Hungary.

Trade in barley has remained stable during the last few years. Imports in 1999 amounted to circa 17,000 MT, while exports were less than 1,000 MT. Circa 90% of imported barley was malting barley. The main supplier in 1999 was Hungary and the main export destination is Bosnia and Herzegovina.

Rye trade in Croatia is negligible.

## **Policy**

### **Tariff Changes**

The Croatian government adopted the "Law on Customs Tariffs" in July 1996, covering basic issues of domestic production protection. The customs tariff consists of an ad valorem duty for all products, and

for almost all agricultural and food products, of an additional specific duty. The Croatian government can, based on recommendations of the Ministry of Agriculture and Forestry and the Ministry of Economy, change the level of specific duties depending on fluctuations on domestic and international markets as well as seasonal domestic production peaks. For some cereals the specific duty has been changed several times since mid-1996.

During 1999 the Croatian government adopted only one change for cereals. This change was related to the decrease in “specific duty” for wheat seed material, aimed at covering the lack caused by the insufficient domestic production. Therefore the “specific duty” for wheat seed material was cut in October 1999 from 0.40 HRK/kg to 0.00 HRK/kg.

The current customs protection for grains in Croatia is as follows:

	Subheading	Description of products	Unit	Ad valorem %	Specific duty HRK/unit
10.01		Wheat and meslin.			
	0101.10	-Durum wheat			
	0101.101	--- for sowing	kg	10	0.00
	0101.102	--- Other	kg	10	0.00
	0101.90	-Other			
	0101.901	--- wheat for sowing	kg	10	0.00
	0101.902	--- Other wheat	kg	20	0.52
	0101.909	--- meslin	kg	10	
10.02	1002.00	Rye:			
	1002.001	--- for sowing	kg	10	
	1002.009	--- Other	kg	15	0.00
10.03	1003.00	Barley.			
	1003.001	--- for sowing	kg	10	0.00
	1003.002	--- brewing	kg	0	0.00
	1003.003	--- for livestock feed	kg	15	0.00
	1003.009	--- Other	kg	15	0.40
10.04	1004.00	Oats.			
	1004.001	--- for sowing	kg	10	
	1004.009	--- Other	kg	15	0.40
10.05		Maize (corn).			
	1005.10	-Seed			
	1005.101	--- hybrid	kg	15	
	1005.109	--- Other	kg	15	
	1005.90	-Other			
	1005.901	--- white	kg	20	0.00
	1005.902	--- yellow	kg	20	0.00

	1005.903	--- cinquantino	kg	20	0.00
	1005.909	--- Other	kg	20	0.00
10.06		Rice.			
	1006.10	-Rice in the husk (paddy or rough)			
	1006.101	--- for sowing	kg	5	
	1006.109	--- Other	kg	5	
	1006.20	-Husked (brown) Rice	kg	5	
	1006.30	-Semi-milled or wholly milled rice, whether or not polished or glazed			
	1006.301	--- semi-milled	kg	5	
	1006.309	--- wholly milled	kg	5	
	1006.40	-Broken Rice	kg	5	
10.07	1007.00	Grain sorghum.	kg	5	
10.08		Buckwheat, millet and canary seed; other cereals.			
	1008.10	-Buckwheat	kg	10	
	1008.20	-Millet	kg	10	
	1008.30	-Canary Seed	kg	10	
	1008.90	-Other cereals	kg	15	0.00

Exchange rate: Croatian kuna 7.1158 = \$1.00

Croatia concluded its WTO negotiations on agriculture during Autumn of 1999. Current ad valorem equivalent of custom protection for cereals (including specific duties for more than 50% of agricultural products) is about 18%. WTO membership will commit Croatia to:

- A at accession reduce custom protection by circa 15%, and for products subject to an transitional period for an additional 27% phased over a 4 year period;
- A reduce significantly tariffs for wheat 10%+4.0 EURO/100 kg MAX 60% to 7%+3.0 EURO/100 kg MAX 45% over a 4 year period;
- A apply tariff quotas for wheat: at the day of accession the tariff quota will be 25,000 MT with a 15% tariff and over three years of transitional period will be increased to 30,000 MT with a 15% tariff.
- A abstain from the use of export subsidies.

In the process of WTO accession Croatia took the obligation to bind tariffs upon accession as shown in the table below. Further reduction of duties shall be applied during the transitional periods.

Tariff item number	Description	Tariff
1001	Wheat and meslin.	
100110	-Durum wheat	
1001101	--- for sowing	2%
1001102	--- Other	5
100190	-Other	

1001901	--- wheat for sowing	10
1001902	--- Other wheat	10+4,0 EURO/100 kg
		MAX 60%
1001909	--- meslin	5
100200	Rye:	
1002001	--- for sowing	10
1002009	--- Other	45
100300	Barley.	
1003001	--- for sowing	10
1003002	--- brewing	10+5,0 EURO/100 kg
		MAX 39
1003003	--- for livestock fodder	10+4,0 EURO/100 kg
		MAX 40
1003009	--- Other	10+4,7 EURO/100 kg
		MAX 40
100400	Oats.	
1004001	--- for sowing	10
1004009	--- Other	40
1005	Maize (corn).	
100510	-Seed	
1005101	--- hybrid	5
1005109	--- Other	5
100590	-Other	
1005901	--- white	23
1005902	--- yellow	25
1005903	--- cinquantino	10
1005904	--- popcorn	10
1005909	--- Other	23
1006	Rice.	
100610	-Rice in the husk (paddy or rough)	
1006101	--- for sowing	2
1006109	--- Other	2
100620	-Husked (brown) Rice	2
100630	-Semi-milled or wholly milled rice, whether or not polished or glazed	
1006301	--- Semi-milled	2
1006309	--- wholly milled	2
100640	-Broken Rice	2
100700	Grain sorghum.	5

1008	Buckwheat, millet and canary seed; other cereals.	
100810	-Buckwheat	10
100820	-Millet	10
100830	-Canary Seed	10
100890	-Other cereals	
1008901	--- wild Rice (Zizania aquatica)	5
1008909	--- Other	10

## Production Policy

One of the biggest problems the Croatian government faces in most years is how to organize its “floor price” and subsidy policies in respect to regular big surpluses of wheat, corn and other crops.

High production costs (resulting from high cost of inputs and production structure) mean that in many years Croatian cereals are not competitive on the world market. In such situations farmers revert to selling their surpluses to the State Reserves at “floor prices,” which are higher than world prices.

In the past the high Croatian government “floor prices” coupled with subsidies paid per kilogram resulted in an end loss to the Croatian government.

An illustrative example of the above-mentioned policy problems of agricultural production is the Summer 1998 "Wheat Case" in which the State Reserves were obliged to buy 420,000 MT of wheat from small family farms, at a price of 1.10 HRK/kg. Later the Croatian government has to export at least 200,000 MT of this wheat at world prices, most probably involving financial losses due to the price difference.

Anticipating such problems in the future, during Summer 1998 the Ministry of Agriculture and Forestry (Ministry of Agriculture and Forestry) formulated a new model of agricultural incentives, which was approved in March 1999. The basic elements of this proposed system are:

1. Decrease of the “floor prices”, with a goal of approaching world price levels, and
2. Introduction of payments according to limited production areas.

In line with this policy change the Croatian government set the guaranteed producer price for standard quality of wheat at 0.75 HRK/kg for the 1999 crop. However, this provoked strong protests from farmers' associations which organized widespread road blockages during early Summer 1999. As a result of this pressure, the Croatian government agreed to increase the guaranteed price for wheat to a level of 0.90 -1.00 HRK/kg.

It is hoped that this new concept will assure faster structural adaptation within the Croatian agricultural sector, increasing the income stability of Croatian farmers, and achieving higher competitiveness and integration into world markets.



Regarding cereals, till now the Croatian government also paid subsidies for certified seed. The subsidy for corn seed is set at 2.60 HRK/ kg and wheat subsidy at 0.25 HRK/kg.

Following the Parliamentary election victory in December 1999, the new Croatian coalition government came under pressure from farmers to start implementing stronger support policies for the agricultural sector. As a result, the Croatian government budget allocation for agriculture in year 2000 will be 1.73 billion HRK, which represents a 10% increase compared to 1998. However, farm subsidies will be 25% higher, since this year the Croatian government allocated 1.39 billion HRK compared to 1.11 billion HRK in 1998.

In a move to cushion the initial shock of expected WTO membership, the Ministry of Agriculture and Forestry is preparing a new draft "Law on incentives and subsidies," which has to be approved by the Croatian government by the end of April. The draft presages the following increases in subsidies for cereal production:

Commodity	Subsidy (kuna/ha)		Increase %
	1999	2000	
Wheat	1,050	1,370	30%
Feed Barley	500	1,000	100%
Malting Barley	1,200	1,500	25%
Durum Wheat	1,300	1,630	25%
Rye	1,200	1,500	25%
Corn	0	800	n/a

Another problem Croatian farmers face with regard to all crops is the timely payment by the Croatian government or various companies that contracted for production. This means that farmers don't get paid for crops delivered for months, thus bearing on them a financial squeeze, often resulting in the reduced or delayed sowing of new crops.

## Marketing

Due to the loss of traditional markets in former Yugoslavia, sales of surplus agricultural production became a major problem for commodities such as wheat. Also, cereal marketing is severely constrained by the concentration of ownership of most handling facilities in the formerly socialist "agrokombinati", large vertically integrated enterprises which include farmland, input supply facilities, and downstream marketing facilities. In the major grain growing region of eastern Croatia, for example, grain marketing is dominated by three large "agrokombinati" which are in very poor financial condition and which delay payments to producers for months. Some small private grain warehousing facilities have begun to emerge but remain quite rare.

Also, Croatia still does not have an organized board of trade or other private commodity exchange for cereals or other crops, which presents an additional disadvantage to producers.

PSD Table						
Country	Croatia					
Commodity	Wheat	(1000 HA)(1000 MT)				
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Harvested	0	251	0	169	0	230
Beginning Stocks	0	228	0	552	0	404
Production	0	1074	0	558	0	850
TOTAL Mkt. Yr. Imports	0	80	0	7	0	10
Jul-Jun Imports	0	0	0	0	0	0
Jul-Jun Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	0	1382	0	1117	0	1264
TOTAL Mkt. Yr. Exports	0	10	0	13	0	20
Jul-Jun Exports	0	0	0	0	0	0
Feed Dom. Consumption	0	56	0	10	0	50
TOTAL Dom. Consumption	0	820	0	700	0	720
Ending Stocks	0	552	0	404	0	524
TOTAL DISTRIBUTION	0	1382	0	1117	0	1264

Export Trade Matrix			
Country	Croatia		
Commodity	Wheat		
Time period	calendar	Units:	metric tons
Exports for:	1999		2000
U.S.	0	U.S.	
Others		Others	
Bosnia	8772		
Yugoslavia	3215		
Slovenia	991		
Total for Others	12978		0
Others not Listed	181		
Grand Total	13159		0

Import Trade Matrix			
Country	Croatia		
Commodity	Wheat		
Time period	calendar	Units:	metric tons
Imports for:	1999		2000
U.S.	0	U.S.	
Others		Others	
Hungary	5365		
Austria	1027		
Slovenia	444		
Total for Others	6836		0
Others not Listed	90		
Grand Total	6926		0

PSD Table						
Country	Croatia					
Commodity	Corn	(1000 HA)(1000 MT)				
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Harvested	0	379	0	384	0	380
Beginning Stocks	0	457	0	275	0	351
Production	0	2034	0	2135	0	2240
TOTAL Mkt. Yr. Imports	0	1	0	39	0	1
Oct-Sep Imports	0	0	0	0	0	0
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	0	2492	0	2449	0	2592
TOTAL Mkt. Yr. Exports	0	172	0	59	0	200
Oct-Sep Exports	0	172	0	59	0	200
Feed Dom. Consumption	0	1850	0	2000	0	2000
TOTAL Dom. Consumption	0	2045	0	2039	0	2050
Ending Stocks	0	275	0	351	0	342
TOTAL DISTRIBUTION	0	2492	0	2449	0	2592

Export Trade Matrix			
Country	Croatia		
Commodity	Corn		
Time period	calendar	Units:	metric tons
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Spain	24986		
Bosnia	13987		
Algeria	7953		
France	5688		
Slovenia	4878		
Total for Others	57492		0
Others not Listed	1585		
Grand Total	59077		0

Import Trade Matrix			
Country	Croatia		
Commodity	Corn		
Time period	calendar	Units:	metric tons
Imports for:	1999		2000
U.S.	35	U.S.	
Others		Others	
Hungary	39149		
Slovenia	174		
Total for Others	39323		0
Others not Listed	71		
Grand Total	39429		0

PSD Table						
Country	Croatia					
Commodity	Barley	(1000 HA)(1000 MT)				
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Harvested	0	43	0	45	0	30
Beginning Stocks	0	1	0	16	0	22
Production	0	143	0	125	0	96
TOTAL Mkt. Yr. Imports	0	16	0	17	0	18
Oct-Sep Imports	0	16	0	0	0	0
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	0	160	0	158	0	136
TOTAL Mkt. Yr. Exports	0	1	0	1	0	1
Oct-Sep Exports	0	1	0	1	0	1
Feed Dom. Consumption	0	125	0	115	0	120
TOTAL Dom. Consumption	0	143	0	135	0	125
Ending Stocks	0	16	0	22	0	10
TOTAL DISTRIBUTION	0	160	0	158	0	136

Export Trade Matrix			
Country	Croatia		
Commodity	Barley		
Time period	calendar	Units:	metric tons
Exports for:	1999		2000
U.S.	0	U.S.	
Others		Others	
Bosnia	831		
Slovenia	110		
FYROM	39		
Total for Others	980		0
Others not Listed	0		
Grand Total	980		0

Import Trade Matrix			
Country	Croatia		
Commodity	Barley		
Time period	calendar	Units:	metric tons
Imports for:	1999		2000
U.S.	0	U.S.	
Others		Others	
Hungary	16805		
Slovakia	108		
Total for Others	16913		0
Others not Listed	86		
Grand Total	16999		0

PSD Table						
Country	Croatia					
Commodity	Rye	(1000 HA)(1000 MT)				
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Harvested	0	2	0	2	0	2
Beginning Stocks	0	1	0	0	0	1
Production	0	6	0	6	0	6
TOTAL Mkt. Yr. Imports	0	1	0	3	0	2
Oct-Sep Imports	0	0	0	0	0	0
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	0	8	0	9	0	9
TOTAL Mkt. Yr. Exports	0	0	0	0	0	0
Oct-Sep Exports	0	0	0	0	0	0
Feed Dom. Consumption	0	3	0	4	0	5
TOTAL Dom. Consumption	0	8	0	8	0	7
Ending Stocks	0	0	0	1	0	2
TOTAL DISTRIBUTION	0	8	0	9	0	9



Export Trade Matrix			
Country	Croatia		
Commodity	Rye		
Time period	calendar	Units:	metric tons
Exports for:	1999		2000
U.S.	0	U.S.	
Others		Others	
Germany	110		
Switzerland	274		
Total for Others	384		0
Others not Listed	0		
Grand Total	384		0

Import Trade Matrix			
Country	Croatia		
Commodity	Rye		
Time period	calendar	Units:	metric tons
Imports for:	1999		2000
U.S.	0	U.S.	
Others		Others	
Hungary	1530		
Austria	1017		
Total for Others	2547		0
Others not Listed	1		
Grand Total	2548		0

PSD Table						
Country	Croatia					
Commodity	Oats	(1000 HA)(1000 MT)				
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Harvested	0	22	0	24	0	20
Beginning Stocks	0	0	0	0	0	0
Production	0	56	0	57	0	50
TOTAL Mkt. Yr. Imports	0	0	0	0	0	0
Oct-Sep Imports	0	0	0	0	0	0
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	0	56	0	57	0	50
TOTAL Mkt. Yr. Exports	0	0	0	0	0	1
Oct-Sep Exports	0	0	0	0	0	0
Feed Dom. Consumption	0	55	0	57	0	49
TOTAL Dom. Consumption	0	56	0	57	0	49
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	56	0	57	0	50

Export Trade Matrix			
Country	Croatia		
Commodity	Oats		
Time period	calendar	Units:	metric tons
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Bosnia	376		
Total for Others	376		0
Others not Listed			
Grand Total	376		0

Import Trade Matrix			
Country	Croatia		
Commodity	Oats		
Time period	calendar	Units:	metric tons
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Hungary	9		
Total for Others	9		0
Others not Listed	2		
Grand Total	11		0

Export Trade Matrix			
Country:	Croatia	Units:	metric tons
Commodity:	Rice		
Time period:	calendar		
Exports for			1999
U.S.		U.S.	
Others		Others	
		Bosnia	313
Total for Others			313
Others not listed			27
Grand Total			340

Import Trade Matrix			
Country:	Croatia	Units:	metric tons
Commodity:	Rice		
Time period:	calendar		
Imports for			1999
U.S.		U.S.	0
Others		Others	
		Italy	4142
		Vietnam	1541
		Slovenia	958
		Thailand	632
Total for Others			7273
Others not listed			1664
Grand Total			8937